

Puget Sound Energy Equity Advisory Group Meeting

Meeting Summary

Monday, July 20, 2026 | 5 – 7 p.m.

Meeting purpose & topics

Equity Advisory Group (EAG) meeting objectives:

- Update members on Clean Energy Compliance Report and provide brief overview of key outcomes
- Discuss origin and intent of deepest need and minimum designation concept
- Review challenges and known barriers to current requirements
- Collect feedback on potential approaches to delivering and measuring energy benefits, to propose in the 2027 ISP

Agenda

1. Opening – 5:00 p.m.
2. Energy Equity News Briefs: Clean Energy Compliance Report – 5:20 p.m.
3. ISP: Distribution of Benefits for Deepest Need Customers – 5:40 p.m.
4. Break – 6:00 p.m.
5. Facilitated Discussion – 6:10 p.m.
6. Public comment – 6:55 p.m.
7. Next Steps – 7:00 p.m.
8. Adjourn – 7:00 p.m.

Meeting summary

Below is a summary of the presentations and discussions from the July 20, 2026 EAG meeting. A recording of the presentation portions of the meeting is also available on the [EAG YouTube channel](#).

Opening

The meeting opened with introductions led by facilitator Ariam Ford. Yvonne provided a wildfire safety moment, reviewing emergency preparedness steps for the active wildfire season, including creating household emergency plans, updating PSE account contact information, applying for life support status if needed, and maintaining vegetation near power lines.

An EAG member presented the Equity Moment on the Jemez Principles for Democratic Organizing - created in 1996 by forty contributors of diverse backgrounds. The six principles include: being inclusive, emphasis on bottom-up organizing, letting people speak for themselves, working together in solidarity and mutuality, building just relationships among ourselves, and commitment to self-transformation. The presenter noted these principles strongly resonate with the EAG's mission of bringing together diverse perspectives from across PSE's service territory to support a just energy transition.

Energy Equity News – Clean Energy Compliance Report

Regulatory Requirements: Under CETA and Washington Administrative Code (WAC) 480-100-610 through 650, PSE is required to file a Clean Energy Compliance Report demonstrating progress toward interim and final clean energy targets, equitable distribution of benefits, and compliance with specific conditions established by the UTC.

General Overview: Brian Tyson, Manager, Clean Energy Planning & Implementation, presented on PSE's first Clean Energy Compliance Report, filed July 1, 2026, covering the 2022-2025 implementation period. This report marks a significant milestone in PSE's clean energy transformation journey and demonstrates the tangible impact of the EAG's contributions since the group's inception.

PSE's clean energy portfolio increased from the 30.7% four-year average (2018-2021) to 50.6%, reflecting the addition of 3,800 megawatts of new short-term and long-term clean resources. While PSE did not meet its original goal of a four-year average of 54.5%, the shortfall was attributed to higher-than-expected customer demand and historic drought conditions that reduced hydroelectric generation in several years of the reporting period.

PSE exceeded the 2.5% minimum designation of energy benefits for deepest need customers across all program categories:

- Energy efficiency: ~11% of benefits directed to deepest need customers
- Demand response: ~8% of benefits directed to deepest need customers
- Distributed solar: ~5% of benefits directed to deepest need customers
- Distributed storage: ~3% of benefits directed to deepest need customers

For the 30% named communities minimum designation, PSE exceeded the goal for energy efficiency and demand response but fell short for distributed solar (~23%) and distributed storage (~25%), primarily due to high upfront costs and structural barriers to participation.

Brian emphasized that the EAG fundamentally changed PSE's approach to equity by helping the company understand vulnerability factors, implement place-based analysis and program design, and develop the equity framework with clear definitions, targeting mechanisms, and

accountability measures. Customer benefit indicators, co-created with the EAG, now track progress over time. The EAG also informed pathways for community co-design in programs and products. Key initiatives informed by equity insights include multilingual outreach, enhanced financial assistance, community partnerships, and the Empowerment pilot's focus group sessions.

Ashley King from PSE's regulatory team clarified that the UTC would issue a formal compliance determination ("thumbs up or thumbs down") rather than a full policy statement. The public comment period on the report closes October 20, 2026, followed by an open meeting where the UTC commissioners will review the report and make their determination. PSE did not file a 2025 Clean Energy Implementation Plan (CEIP); instead, new clean energy targets will be established through the Integrated System Plan (ISP) process, with filing expected in April 2027.

Previous EAG Engagement: The EAG has been instrumental since 2020 in shaping PSE's equity approach. Members helped define "customers in the deepest need" and "named communities," established vulnerability factors, co-created customer benefit indicators, and provided ongoing feedback on program design and implementation. Brian noted that the compliance report would not exist in its current form without the EAG's foundational work.

Key Feedback Summary:

- General appreciation for the organization exceeding its 2.5% target across all program categories, recognizing this achievement as a testament to their commitment and strong teamwork.
- An EAG member asked whether the UTC would issue a policy statement regarding any shortfalls and if there would be adjustments to the PSE's projected clean energy targets.
 - It was clarified that the focus would be on making a formal compliance determination rather than a policy statement, with new targets set for the upcoming implementation period. Questions raised about the mix of renewable resources added, particularly regarding distributed solar and batteries.
 - The report confirmed that it detailed both customer-oriented programs, such as solar energy credits and community solar initiatives, as well as large-scale resources that were acquired or contracted. Further inquiries about the challenges of implementing solar and storage programs highlighted issues such as high upfront costs, required home upgrades, and competing customer priorities.

Specific feedback and questions can be found in [Attachment B: Q&A and Feedback Report](#).

ISP: Distribution of Benefits for Deepest Need Customers

Regulatory Requirements: Following PSE's 2023 biennial filing, the UTC issued a condition requiring PSE to establish a minimum designation for the next planning cycle (originally the 2025 CEIP, now the 2027 ISP) that is at least equal to the proportion of customers in the deepest need across PSE's service territory. This replaces the previous 2.5% minimum designation target, which was set as half of the proportional share because PSE was midway through the implementation period when the condition was issued. The condition also required PSE to direct 30% of energy benefits from specific categories of customer-sided programs (energy efficiency, demand response, distributed solar, and distributed storage) to customers in named communities. The UTC expects meaningful advisory group engagement on approaches to delivering and measuring equitable distribution of clean energy benefits, particularly for deepest need customers.

General Overview: Brian, joined by Melissa Troy, Supervisor, Customer Outreach, and Ray Outlaw, Manager, Communications Initiatives, presented PSE's proposed approach to distributing and measuring clean energy benefits to deepest need customers in the 2027 ISP. The presentation focused on revisiting the intent of the regulatory condition language, reviewing known participation barriers, and soliciting EAG feedback on potential adjustments to the minimum designation framework.

The July 2026 EAG meeting is the first of two dedicated EAG sessions on minimum designation, with a follow-up discussion scheduled for September. Between now and the April 2027 ISP filing, PSE will publish a draft ISP, hold office hours, and incorporate EAG feedback before finalizing the plan.

The ISP integrates multiple discrete planning exercises into one cohesive system plan. Today's discussion specifically focused on the **customer programs and products** component of the plan.

Brian reviewed foundational concepts that ground the minimum designation framework:

- **Equitable distribution of benefits and reduction of burdens:** A core tenet of CETA that underpins PSE's equity commitments
- **Named communities:** A combination of highly impacted communities and vulnerable populations. Vulnerability factors were co-developed with the EAG and include demographic, geographic, and socioeconomic indicators
- **Deepest need:** Customers experiencing severe energy burden *plus* multiple compounding factors that hinder their ability to access adequate resources. This definition was also shaped with EAG input, along with members from PSE's Low Income Advisory Committee (LIAC) and Conservation Resource Advisory Group (CRAG)
- **Tranche of resources:** A grouping approach where benefits are measured across program categories (e.g., all distributed solar programs combined) rather than program-

by-program. For example, if PSE deploys 100 MW of distributed solar, 30 MW must be installed in named communities and 2.5 MW to deepest need customers

- The relevant tranches of resources for the minimum designation requirement are:
 - Energy efficiency (e.g. insulation, appliances)
 - Demand response (e.g. adjusting power use during peak events)
 - Distributed solar (e.g. customer owned solar, community solar)
 - Distributed storage (e.g. customer-owned batteries)

Melissa presented barriers that prevent deepest need customers from fully participating in clean energy programs, drawing on insights from PSE's customer outreach team, the DER empowerment pilot, and the EAG:

- **High upfront costs:** Rooftop solar and battery storage require significant capital investment that is prohibitive for households struggling with immediate needs like bills, housing, and family support.
- **Home and infrastructure requirements:** Many homes in deepest need communities require electrical upgrades, roof repairs, or structural improvements before solar or storage can be installed. Geographic factors like roof orientation, tree coverage, and property ownership also create layered barriers.
- **Competing priorities:** Customers in deepest need are prioritizing immediate affordability and reliability over adoption of clean energy technologies—not because they lack interest, but because urgent needs take precedence.
- **Time, effort, and paperwork:** The enrollment process, incentive applications, and ongoing program participation can feel burdensome, especially when benefits don't feel immediate or substantial enough to outweigh the effort required.

Melissa explained that energy efficiency and demand response significantly exceeded the 2.5% target because many programs in these categories have lower upfront costs, easier enrollment processes, and more immediate, tangible benefits (e.g., energy efficiency directly reduces bills). In contrast, distributed solar and storage faced cost and structural barriers that limited participation.

She emphasized that the core intent of the minimum designation conditions is to ensure the clean energy transition is fair, reasonable, and inclusive—that vulnerable communities are not left carrying a greater share of costs and are able to participate in and benefit from the transition in ways that meet their actual needs and circumstances. Programs are most successful when they are flexible and meet customers where they are, from outreach and enrollment to incentive design and support services.

PSE presented three potential adjustments to the minimum designation approach for EAG feedback:

1. **Aggregate benefits across tranches** rather than requiring uniform delivery within each program category (energy efficiency, demand response, distributed solar, distributed storage)
2. **Expand the calculation to include resources that offer community-level benefits** to deepest need customers (e.g., solar installations on food banks, CBOs, or climate resilience hubs that serve deepest need populations)
3. **Prioritize delivering programs and services that customers say they need and want** rather than programs PSE is required to deliver based on current condition structure

Previous EAG Engagement: The EAG has been instrumental in shaping PSE's equity approach since 2020. Members helped define "deepest need" and "named communities," co-created vulnerability factors, aligned on what energy benefits should look like, and provided critical customer and community perspectives that drove program design changes. Brian noted the group has an incredible wealth of historical background and knowledge that continues to inform PSE's clean energy transition work.

Break

The group held a break from 6:00 – 6:10 p.m.

Facilitated Discussion

Following the ISP presentation, the EAG participated in a facilitated discussion using Mentimeter, a live e-engagement tool. The discussion prompt asked: "Does this feel like a reasonable and responsive approach? Do you have any additional ideas or suggestions PSE should consider as they build this out into the new ISP?" The question referred to PSE's three proposed adjustments: aggregating benefits, expanding calculations to include community benefits, and prioritizing programs customers say they need. Several themes emerged from EAG input:

- **Benefit aggregation and tranche differentiation:** Members shared a range of views on aggregating benefits versus maintaining tranche-level tracking.
 - Some members noted that aggregating data could mask where specific barriers exist, making it harder to identify and address program-level challenges.
 - Others noted that differentiated targets by tranche might help align programs where accessibility is easier or more difficult.
 - Setting different percentage targets by tranche, rather than a uniform target or full aggregation, was identified as an area for further exploration.
 - Members raised the question of how PSE tracks and incorporates what customers say they need and want as part of this approach.
- **Community benefit measurement:**
 - Members generally supported the concept of counting community-level benefits (e.g., solar on a food bank or resilience hub) toward minimum designation calculations

- Public-sector and municipal partnerships were raised as a potential avenue to scale community solar and resilience hub projects.
- Credibly measuring individual-level impact from community-level projects is important, and also challenging and not explicitly defined.
 - There is a distinction between direct benefits (e.g., backup power access during an outage) and indirect benefits (e.g., a reduction in a CBO's operating costs). Indirect impacts can be harder to attribute and measure, and there is more skepticism of this as a true community benefit.
 - Data collection presents a challenge, including the feasibility of surveying program participants or beneficiaries. PSE is currently piloting voluntary post-project surveys with grant recipients to help gauge these impacts, based on previous EAG feedback.
- **Program framing and customer choice:** Reliability, affordability, and clean energy programs should be presented as complementary rather than siloed, so customers understand both short-term (e.g., bill assistance) and long-term (e.g., rooftop solar) options together.
 - Customers across all income levels should have freedom of choice in which programs they participate in
 - PSE should be thoughtful not to over-rely on any single program type (e.g., demand response) to meet deepest-need targets.
 - A clear sense of customer control over participation and equipment requirements in programs like demand response can contribute to customers' comfort with the technology and willingness to participate.
- **Additional considerations raised:**
 - Safety and community education implications of expanding battery storage in areas with varying emergency response capacity
 - Interest in increasing the number of community solar shares available and pairing this with expanded outreach to increase program awareness
 - Considerations around whether accessibility (e.g., geographic or eligibility limitations) versus cost is the larger barrier to program participation, particularly for distributed solar and storage.

Specific feedback and questions can be found in [Attachment B: Q&A and Feedback Report](#) and [Attachment C: Mentimeter Responses](#)

Public Comment:

Public comment was scheduled from 6:55 p.m. to 7:00 p.m. No members of the public joined the meeting to provide verbal comment. Viewers on the YouTube livestream were invited to submit comments via chat, which were monitored by facilitator Julia Martinez. There were no written comments from YouTube livestream viewers.

Next Steps:

- Ariam reminded members to complete the post-meeting survey to provide additional feedback on the session format, content, and facilitation
- Ariam thanked the presenters and members for an excellent discussion and reminded everyone to enjoy summer break. The EAG will not meet in August. The next steering committee meeting will be on Tuesday, September 8, 2026, and the next EAG meeting is scheduled for Monday, September 21, 2026.

Adjournment:

The meeting concluded at 7:00 p.m.

Attachment A: Meeting Attendees

Equity Advisory Group Members

1. Alex Perez — Energy Equity Professional
2. Anthony Geren — IBEW 46 & Community Organizer
3. Christina Adams — Community Advocate
4. Dorian Taylor — Community Advocate
5. Elizabeth Vaughn — Sustainable Connections
6. Glenda Duldulao — Asia Pacific Cultural Center
7. Ibrahim Dembele — Public Finance and Community Advocate
8. Megan Walsh — Community Advocate
9. Monica Guevara — Emerald Cities Collaborative
10. Nathe Lawver — Pierce County Central Labor Council, AFL-CIO
11. Peeyush Kumar, PhD — Community Advocate
12. Rachel Gates — Community Advocate

Puget Sound Energy

13. Troy Hutson, Director, Energy Equity
14. Yvonne Wang, Manager, Energy Equity
15. Melissa Troy, Supervisor, Customer Outreach
16. Brian Tyson, Manager, Clean Energy Planning & Implementation
17. Ray Outlaw, Manager, Communications Initiatives
18. Ashley King, Manager, Regulatory Policy

Consultant Staff

- 19. Ariam Ford, AICP, Uncommon Bridges
- 20. Carson Bridges, Uncommon Bridges
- 21. Julia Martinez, Uncommon Bridges

Attachment B: Q&A and Feedback Report

Topic Area	Question/Comment	Response/Notes
Clean Energy Compliance Report	Will the UTC respond to this report? If so, do they make a policy statement regarding shortfalls?	The UTC will make a formal compliance determination (“thumbs up/down”) but likely won’t provide a lengthy policy statement. The report is currently still in comment period through October 20.
	Is PSE planning on adjusting the projected clean energy targets?	New targets will be established in the ISP for the next implementation period.
	Does the report describe the mix of renewable resources added? Is it in the distributed solar and batteries?	The report describes mix including distributed resources (solar credit, net metering, community solar) and large-scale resources (both short and long-term acquisitions)
	A member expressed appreciation for exceeding the 2.5% deepest need target across all buckets; very hopeful	PSE thanked the team and noted it’s truly a team effort.
	What were the challenges with solar and storage that you mentioned?	High upfront costs, needed home upgrades, and customers prioritizing other needs over solar/storage installation.
ISP: Distribution of Benefits for Deepest Need Customers	How was the 2.5% target for deepest need customers decided?	The target was based on proportional share (~5-6%) but set at 2.5% because PSE was halfway through implementation period.
	Does this mean we can reevaluate from 2.5% to 3%, 4%?	Yes – the ISP will propose a new minimum designation based on the current proportion of deepest need customers in service territory.

Topic Area	Question/Comment	Response/Notes
	A member asked for clarification on tranches and condition language.	Tranches mean looking at program categories as groups (all energy efficiency programs together) rather than individual programs.
	The barrier of upfront cost for clean energy technologies makes sense. This technology at individual level is definitely high.	Thank you for your comment.
	For distributed solar/storage, are most projects benefiting named communities retail household customers or community-based projects? Member agrees that counting at community-based project level could be beneficial.	PSE was initially focused on the residential side, but is now considering how to count community-based projects (e.g., solar on food banks, resilience hubs) as benefiting deepest need customers.
	"I'd love for the whatever solar storage projects to be a direct resource and not just an offset to a CBO's operations."	Thank you for your feedback.
	How would you get information about community benefits?	PSE is using post-implementation surveys for solar grant recipients, asking how projects benefit the organization and individuals served (voluntary participation).
	Tracking indirect benefits will be hard because PSE doesn't control them; difficult to measure	This is a known challenge and continues to be an important area for discussion and identifying strategies.
	Folks in deepest need may not have capacity to leverage programs. How are we approaching that?	Community solar/income-eligible programs are designed with fewer barriers (no property ownership or roof condition requirements, no upfront cost for income-eligible participants). PSE is still working through how to design programs/products that meet deepest-need customers

Topic Area	Question/Comment	Response/Notes
		where they are, and how to capture additional benefits (e.g., resilience) even when customers can't directly purchase/participate in an asset.
	Hopefully a building that is in better shape than [individual homes in named communities] and could help with the cost, is if programs are taken to the extra community level – a public building, or government building.	The ISP team will take this into consideration. Thank you for the feedback.
	Thinking about ways to collect data... a survey of who is using [the community service], what their income is, or what their needs are.	Thank you for these considerations.
	I hear you on initial costs, but I'm just wondering, it seems like community solar is a big component of the distributed solar. Did a significant proportion of deepest needs customers even have access to community solar to be able to participate in the first place? Is it more like a number of projects and geographic challenge as opposed to just simply a cost challenge	Barriers extend beyond upfront cost and include housing situation, roof orientation, tree cover, and other site-specific conditions. People love community solar because community solar shares can provide bill reductions without requiring customers to install solar on their own property.
	Living in a rural area, not all communities have the capacity to put out a battery fire. What education are we providing? If a homeowner says there's a fire and they start spraying their battery... It would be important	Thank you for your comment – this is a good point to highlight. The ISP team will consider this in planning.

Topic Area	Question/Comment	Response/Notes
	to have a conversation of both the benefits and some of the risks.	
	I've gotten an email about [demand response] many times, and I've never quite been able to push the "yes" button. What is the benefit of that?	Demand response (1) reduces system infrastructure costs, benefiting all customers' bills, (2) provides individual incentives/rewards/gift cards for participants.
	I would be scared to give up control. Personal hesitation about demand response due to extreme heat (101°F) and concerns about losing control of thermostat	Customers always retain override control – can take back thermostat control anytime. Some programs are purely behavioral (Flex Rewards) with no equipment requirements.
	Barriers include needing smart thermostats; affordability concerns	Some DR programs don't require smart equipment – Flex Rewards is behavioral only with voluntary participation.
	Trust is important – override information never came through in emails	Thank you for your feedback.
	I'm one of those people who feels that some level of differentiation across the tranches and categories is still important.	Thank you for your feedback.
	One way to address that could be tweaking the target across the tranches.	Thank you for your feedback.
	I think it's also important to frame these programs... reliability, affordability, and clean energy in conjunction	We can consider finding ways to describe both short and long-term solutions for customers. Thank you for your feedback.
	I want all populations... to have the freedom of choice to choose any of these programs without the barriers in between. I would love	Thank you for your comment. Continuing this conversation on access and how that may look for different customers

Topic Area	Question/Comment	Response/Notes
	to work on removing as many of those barriers as possible. I want freedom of use for all populations within PSE.	with different priorities is a key part of the discussion moving forward.
	I'm actually curious about the community benefits aspect of it. Specifically, how would you measure the individual impact with this community benefit offering? Is there a way to actually define that and collect them and aggregate them across those different programs?	Measuring community benefits would likely vary by project type. Translating community-level benefits into individual-level impacts is challenging. Potential approaches could be measuring outcomes such as dollars invested in a community, reliability improvements, resilience benefits (e.g., microgrids or resilience hubs), or emergency backup power available to customers during outages. Project-specific benefit metrics may be possible but would require reviewing individual programs and identifying appropriate measures for each.
	I am hoping to see an increase of community solar shares available to make the program more accessible! A tandem outreach strategy could bring more awareness to the program benefits.	Thank you for your feedback.
Post Meeting Submissions	Compliance Report - What is the difference between net energy metering (NEM) and customer-owned > 100KW? Is it just the size? I had assumed that NEM systems were customer owned. (page 15)	Yes, all Net Metered systems and distributed solar >100 kW – in Table 14 – are intended to be read as “customer owned”. Net Metered systems are limited, by WA state law, to be less than or equal to 100 kW in size. The other 'distributed solar >100' in Table 14 is not eligible for Net Metering.

Topic Area	Question/Comment	Response/Notes
	Compliance Report - How does the elimination of the solar tax credit effect the projected KW impact of Distributed solar projects? (page 15)	Solar projects reported in Tables 13 and 14 on page 15 were installed and placed in service by the end of 2025. As such, they remained eligible under the tax credit rules that were in effect at that time. The subsequent repeal/acceleration of the credit does not retroactively remove eligibility for projects that had already met the placed-in-service requirement by December 31, 2025.
	Compliance Report - I am wondering whether smart devices that automate usage during off-peak times are being integrated? In particular for water-heater and/or electric vehicle use cases. From my reading later on I think it is but just wanted to confirm.	PSE's <u>Flex programs</u> include a range of devices including water heaters, electric vehicles, and battery storage systems.
	Compliance Report - What has been the customers direct feedback on time of use (TOU) programs? How many in the pilot program represented customers that were from deepest need or named communities? (page 23). I'm also really curious whether the first two pilots that had minimal annual savings would be considered 'worth it' from a customer perspective. I have heard that this is why some clients disenroll from other utility TOU programs.	As part of the pilot evaluation, measurement and verification report, overall satisfaction with the time-varying rates pilot was assessed via surveys after each season. As with savings satisfaction, residential overall satisfaction ratings trended upward (see below chart). Income-eligible participants (customers who would qualify for Bill Discount Rate) were assessed as a separate test group and were consistently more satisfied than income-ineligible (0.3 to 0.6 ratings points higher) . The pilot included 2,643 income eligible customers at the end of Year 1 and 2,444 at the end of Year 2. The analysis indicates that all residential rates led to customers saving money in both years , but the best way to assess if annual savings were “worth it” would be the

Topic Area	Question/Comment	Response/Notes
		results of the survey question related to satisfaction with bill savings below. Income-eligible participants were consistently more satisfied than ineligible (0.5 to 0.9 ratings points higher).
	Compliance Report - Why is participation in energy efficiency decreasing for named communities? Are there any theories?	Distributional equity metrics in energy efficiency start at 0 each year. In other words, participation and energy benefits are not cumulative across years. The changes we've seen reflect natural variation as a new set of customers choose to participate in any given year.
	Compliance Report - It appears that named communities and Highly Impacted are still under represented when it comes to distributed storage and distributed solar. Given the progress on balcony / plug-in solar in Washington - is there any thought about a pilot with this technology? Is the challenge solely up-front costs or also geographic? I'm wondering if there is just not much community solar available near customers that could want to take advantage of it.	PSE sees plug-in solar units as having exciting promise as a way for customers to use solar panels to save energy at an affordable cost. However, they may still have a ways to go in terms of safety in the US. While this technology works in Germany, the U.S. has different electrical infrastructure. Standard US electrical outlets are designed to supply power to devices, not receive power from them. Protections like GFCI and circuit overload protections only work one way, and would need to be bi-directional in order to be used for safely plugging in a solar generator. Until all system components are tested and certified as safe for this reverse power flow, these systems are not permitted under US National Electric Code (NEC). Since permitting solar installations through your local NEC jurisdiction (WA L&I or your city) is a key component of our interconnection process and standards, PSE will not be

Topic Area	Question/Comment	Response/Notes
		able to grant permission to operate this technology to our customers until it is permitted by NEC. The Clean Energy States Alliance has a <u>great resource with more information on this topic.</u> Regarding costs and geographic factors, There are two aspects to this question. 1. The upfront costs of solar and storage is certainly a barrier to adoption but there are others. Including housing and roof conditions, home ownership and neighborhood/community requirements, location, tree-cover or shading, etc. 2. Regarding Community Solar, customers do not need to live in proximity to a project in order to subscribe to shares of a project. Available shares are listed on PSE's website and customers may request shares from any available location regardless of where they may live. Note, all income-eligible shares are currently claimed but PSE is constantly working to identify and develop new sites.
	ISP: Distribution of Benefits for Deepest Need Customers - The desire to aggregate into one goal is to ease the salesmanship happening for services that may not be desired by customers. PSE staff may be	Thank you for your comment.

Topic Area	Question/Comment	Response/Notes
	pushed to meet goals regardless of customer wants/needs. In that case I am a little more for the tiered approach that [an EAG member] mentioned in the meeting, putting some realistic goals for each tranche in order to avoid a pushy sales approach. However, I am still concerned about overselling demand response to income-limited customers.	
	Named communities without formal governance/nonprofit representation face unique barriers to grant access, benefit negotiation, and program participation — PSE should consider funding capacity-building, translation, and outreach coordination as part of program design.	Thank you for your feedback. PSE has made significant progress in each of these areas and that work continues as we aim to meet all our customers' needs.
	Battery storage safety (fire risk) needs a system-wide benchmark and community/first-responder education before/alongside expanded deployment.	Thank you for your comment. PSE continues to develop a benchmark for and investigate how best to mitigate any safety concerns from battery storage.
	Community-owned/shared infrastructure models (e.g., solar on public structures) are appealing but require clarity on management, accountability, and equitable benefit distribution.	Thank you for your comment.

Attachment C: Mentimeter Responses

Prompt: "Does this feel like a reasonable and responsive approach? Do you have any additional ideas or suggestions PSE should consider as they build this out into the new ISP?" Referring to proposed adjustments: aggregating benefits, expanding calculations to include community benefits, and prioritizing programs customers say they need.

Theme 1: Aggregating Benefits Across Tranches

Concerned about aggregation reducing accountability, transparency, or visibility

- No to aggregating benefits across tranches.
- While I understand that customers have different needs (clean energy, reliability, affordability, etc.), I think some level of differentiation across tranches is still necessary.
- How does aggregating benefits help over uniform delivery across tranches?
- Tracking benefits by tranche is important for measuring success / failure and accountability.
- I am concerned that demand response will prop up the overall benefits and potentially mask shortfalls in other programs since we won't be getting the breakdown between tranches.
- Will aggregating lose PSE's ability to assess the barriers to participating in any of the programs and who is or who is not accessing the programs?
- Rather than aggregating benefits across tranches, another idea is thinking about shifting the targets for different tranches but still maintaining the individual buckets.

Supportive of aggregation

- Aggregated benefits makes sense to ensure customers are accessing the programs most helpful to them.
- Yes I think these are reasonable. Some of these require more thought than other, but I especially agree with aggregating the benefits and prioritizing programs that are wanted.
- Aggregated benefits are a better focus; however, it is also important to track indirect benefits such as job creation.

Need more information before deciding

- It is hard to say if the first point is reasonable with how vague it is.

Theme 2: Community Benefits Should Be Considered, But Need Clear Definitions and Evidence

Supportive of including community benefits

- Maybe to expanding the calculation to include community benefits. We would need to refine this before it is a yes for me.
- I like the inclusion of resources that offer community benefits.
- It seems like a direction to consider.
- It is reasonable to expand calculations to include resources that offer community benefits, IF PSE reserves the right/power to verify that savings are going directly to community benefit.
- Expanding calculation to include community benefit projects is an interesting idea, but if this is considered, the focus should be less on meeting the target and more on ensuring tangible benefits.
- Aggregated benefits are a better focus; however, it is also important to track indirect benefits such as job creation.

Questions about how community benefits would be defined, measured, and reported

- I will be curious to know what is the scope of this in reference to the individual benefit that we just hear about.
- How those benefits get to the deepest need segments? How does it get measured?
- How will PSE verify that a community-level project benefits customers in deepest need?
- What reporting will show which communities and customer groups received the benefits?
- How will direct customer benefits and broader community benefits be compared?

Questions about what should count as a community benefit

- Is there community benefit for deepest need customers in named communities that work on these projects? Does that count as a community benefit?

- It feels lofty but doable. What other resources can benefit deepest needs besides solar maybe, mobility charging stations in elder communities?

Theme 3: Prioritizing Programs Customers Say They Need

Support for customer-driven prioritization

- Yes I think these are reasonable. Some of these require more thought than other, but I especially agree with aggregating the benefits and prioritizing programs that are wanted.
- It is reasonable to prioritize programs that communities and households need. This sort of efficiency commonly contributes to economic and general health of individuals in those homes.
- Prioritizing programs and services that customers are asking for is definitely important. It would be great to do this in a way that sees reliability, affordability, and clean energy as complementary.

Questions about how customer needs are identified

- How are we tracking "what customers tell us they need and want"?
- How and how often are customers giving feedback on what they need and want?

Theme 4: Equity, Access, and Understanding Barriers

Focus on reaching deepest-need customers

- How those benefits get to the deepest need segments? How does it get measured?
- How will PSE verify that a community-level project benefits customers in deepest need?
- Is there community benefit for deepest need customers in named communities that work on these projects? Does that count as a community benefit?

Understanding barriers to participation

- I'd like a more robust explanation of the barriers customers are encountering, especially for Distributed Solar / Distributed Battery.
- Will aggregating lose PSE's ability to assess the barriers to participating in any of the programs and who is or who is not accessing the programs?

Theme 5: Evaluation and Monitoring

- Yes, it does feel like a reasonable approach. PSE should continue carefully see how the community responds to these efforts.
- What reporting will show which communities and customer groups received the benefits?
- How will direct customer benefits and broader community benefits be compared?
- Tracking benefits by tranche is important for measuring success / failure and accountability.

Theme 6: Specific Program Comments

Demand response

- Also concerned about the uptick in demand response programs.
- I am concerned that demand response will prop up the overall benefits and potentially mask shortfalls in other programs since we won't be getting the breakdown between tranches.

Distributed energy resources

- I'd like a more robust explanation of the barriers customers are encountering, especially for Distributed Solar / Distributed Battery.

Additional community-benefit ideas

- It feels lofty but doable. What other resources can benefit deepest needs besides solar maybe, mobility charging stations in elder communities?

